

## **EI Targeted Case Management Task Force Meeting July 28, 2011**

### **Attendance:**

Adele Rohner, Alison Standing, Brenda McGee, Carol Burke, Debra Holloway, Sharlene Stowers, Heidi Faustini, Jennifer McElwee, Joyce Howard, Pam Park, Sandra Church, Beth Tolley, Deana Buck, Jeff Beard, Tammy Whitlock

### **Pre-implementation Training**

- The Billing and Reimbursement webinar was held July 19. A follow up Q & A document along with an updated EI TCM Reimbursement fact sheet was sent to System Managers July 26, 2011. It has been learned that the recording did not work. However, the content of the webinar is included in the Q & A document.
- **EI TCM Implementation Webinar: August 18, 2011 (9:00 AM – 10:30 AM) and August 23 (3:00 PM – 4:30 PM)**
  - Deana expressed thanks to the individuals who helped plan, write and edit the content for the training.
  - The content is being converted to the web layout this week.
  - The first practice session is scheduled for August 3. The final practice session will be August 15. Deana asked for volunteers to participate in the practice session. She also asked Task Force members to recruit additional volunteers who are less familiar with the content..
  - The webinar package has 100 lines. Deana will include in the notice about the webinar a request for people to participate together in one location.
  - Target audience: System Managers, Program Directors, Service Coordinators, Supervisors, Fiscal Staff, Quality Assurance Staff
  - August 23 will be a repeat of the August 18 session
  - Registration information will be sent in August
- **Question and Answer Session Sept 12, 2011 (9:00 AM – 10:00 AM)**
  - Target Audience: System Managers, Program Directors, Service Coordinators, Supervisors, Fiscal Staff, Quality Assurance Staff
  - Purpose: Provide a forum to address questions that have arisen after Local Systems have begun to apply what they learned in the August webinar.
  - Questions will be submitted ahead of time and there will also be an opportunity for spontaneous questions
- **November 14 at one PM. – Post implementation Q & A**
  - Target audience: System Managers and Task Force Members

### **Implementation Communication and Documents**

The following documents were developed to facilitate communication and provide information about EI TCM include:

- **Fact Sheets:**
  - **EI TCM Reimbursement Fact Sheet** (to provide essential information about billing and reimbursement for system managers, billing and reimbursement Staff, administrators/program directors)

- **EI TCM Fact Sheet** (to provide basic overview of the new initiative for general audiences)
- **Family Fact Sheets** (three versions of information for families of children moving from ID TCM or MH TCM or no TCM to EI TCM)
- **Implementation Checklist**
- **Billing and Reimbursement Questions and Answers** (Follow up information from the July 19, 2011 Billing and Reimbursement Webinar for system managers, billing and reimbursement staff, program, quality assurance and administrative staff)
- **Updates**
  - July 6 Memo from Janet Lung
  - Information included monthly in the Infant & Toddler Connection of Virginia TA Updates
- **(In Development) Memo to Executive Directors of Community Service Boards and Behavioral Health Authorities** (to provide information about EI TCM to all CSBs and BHAs, including those that are not Local Lead Agencies for the Infant & Toddler Connection of Virginia)

With the exception of the Family Fact Sheets and the Memo to CSBs/BHAs, the documents are posted on the Infant & Toddler Connection of Virginia website at: <http://www.infantva.org/wkg-EI-TCM.htm>.

The team that developed the Family Fact Sheets is awaiting a decision from DMAS about whether or not the Notice of Action form with information about the appeal process must be provided to families in conjunction with implementation of EI TCM. The team drafted template letters to accompany the Family Fact Sheets; these will be finalized after the decision about appeals notification is made.

### **Early Intervention (EI) Personnel Regulations**

The proposed revisions to the EI Personnel Regulations which include the new requirements for certification of service coordinators as EI Case Managers are currently in the Secretary's office for review. To track the progress of the regulations, go to <http://townhall.virginia.gov/L/ViewAction.cfm?actionid=3477>

### **Case Manager Certification:**

- Deana reported that the required training module, Introduction to Early Intervention Service Coordination can be available August 3, but that doesn't allow time for testing. With time for testing, they hoped to push date to August 15. Beth expressed concern that that will not give DBHDS time to process the Case Manager certification applications.
  - Deana (with the module development team) will work toward having this tested and ready for use **August 8**.
  - Carol, Sharlene, Joyce, Debra, Jennifer, Pam, Adele, Sandra, Alison offered to test the module.
- Updates to ITOTS and the EI Certification database are in process.

- The EI Certification module and associated components of ITOTS are expected to be ready for submission and processing of applications for Case Manager Certification when the training module is ready.
- There is not enough time to make all of the changes in the EI Certification database in time for the influx of applications expected in August and September, so part of the review process will be handled manually.
  - Specifically, the new Service Coordinator qualifications will not be listed in the database.
  - Instructions are being developed for applicants that will specify what information must be provided to DBHDS to allow review and processing of the applications. (Individuals not currently certified as EI Service Coordinators will need to submit documentation of their education and experience (if applicable).
- The process for Service Coordinators who are currently certified as EI SC will be expedited.
  - These SC will be considered to meet the educational/experience requirements.
  - These SC will need to take/pass the test for the Introduction to EI SC module and submit an application (online) for certification as EI CM
  - Part C staff will review the applications and confirm that the training requirement (passing the test for the EI SC module) was met

#### **Revision of Infant & Toddler Connection of Virginia Practice Manual**

- Input from the Documentation Subgroup, EI TCM Task Force members and system managers has been incorporated into the revisions.
- The revised document is expected to be available no later than August 15, 2011

#### **Revision of the DMAS Early Intervention Services Provider Manual**

- Revisions are in process
- DBHDS and DMAS are working together on the manual to assure consistency between the Infant & Toddler Connection of Virginia Practice Manual and the DMAS Early Intervention Services Provider Manual.
- The revised document is expected to be available in September

#### **Provider Enrollment**

- Jeff will send a message to system managers along with a copy of the Provider Information Form and the Revised Provider Agreement Form (which will include a place to specify EI TCM as a service the provider will provide) when the revised Agreement form is ready.
- System managers must complete the Provider Information Form and send it along with the completed Provider Agreement Form to Jeff
- Jeff will add the 119 specialty code to the Provider's information in the DMAS Data system.

#### **DMAS Data System**

In addition to the changes necessary to accept the new procedure code for EI TCM, there will be a correction to allow reimbursement for more than 36 units per year for T 1024. Work is on target for these changes to be ready October 1, 2011.

## ITOTS

- The changes to ITOTS including a place to enter the child's intake date and a place to enter an end date for those children who do not go on to receive IFSP services will be ready October 1, 2011. With these changes, the Medicaid/FAMIS Enrollment/Discharge screen will populate whenever the EI benefit needs to be added or ended (as long as the local system completes the required ITOTS data entry).
- Additional changes include an option to copy information from the child's ITOTS record from one local system to a new local system when the child transfers to a new local system within the state, elimination of the requirement to enter details for commercial insurance and changes in the layout of the ITOTS pages.
- ***A request was made that the Part C Office update the ICDF form to reflect the changes.***

## Discussion and Clarifications about Billing and Reimbursement Requirements

- The requirement that the child be present during the initial and annual IFSP meetings was discussed at length. The intent of the requirement is to assure that the service coordinator observes the child. After much discussion it was determined that documentation of observation of the child by the service coordinator during the month the IFSP meeting was held would meet this intent. Tammy provided further clarification that TCM could not be billed for the months following the month the IFSP meeting was held until there is documentation that the service coordinator has observed the child. ***The reimbursement requirements document, training and manual information will be revised to reflect these clarifications.***
- Tammy clarified that it is acceptable to bill just for the months that an allowable activity occurred. There is not a requirement that there must be a billable activity (and subsequent billing) every month.
- Clarification was provided about when billing can and cannot occur if the requirement for contact with the family every three months is not met. The month during which a family contact occurred as well as the next two months can be billed if there is an allowable activity during those months. If a family contact is not made during the fourth month (three months after the month of the last family contact, that fourth month cannot be billed, nor can any months that follow UNTIL there is another family contact.

## Email contacts can be documented using any of the following mechanisms:

- Placing a copy of the email communication in the child's record
- Copying the content of the email communication and pasting it into a note
- Writing a contact note summarizing the communication.

**Next Meeting: Friday, September 16, 2011 at 1:00.** At a minimum, this will be a teleconference. Information will be provided closer to September 16 about whether there will also be an option to participate in person.